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International Dateline -- Oxford 2003: Fiesole Collection Development Retreat Series No. 5

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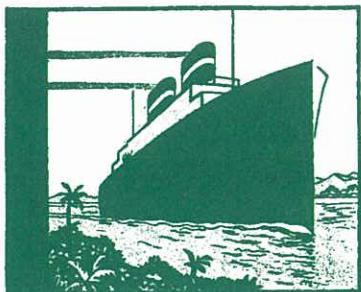
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International Dateline — Oxford 2003: Fiesole Collection Development Retreat Series No. 5

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For the last five years Charleston migrates to Europe for an informal meeting of leading library and information industry participants devoted to thinking through and debating the new world order in collection development. This is the story in the blurb but everyone has a good time too. The home of the series is **Fiesole** under the benevolent patronage of **Casalini Libri**. Many of the presentations and the program can be found on the **Casalini** site at http://digital.casalini.it/retreat/retreat_2003.html. In 2003 the host was **Oxford**. The format has settled down to three panels, a couple of keynotes, a good dinner with speeches, some other entertainments and a lot of interaction. The overall theme and the themes for the panels were a characteristically enigmatic and fractured set of questions. The main theme was *Authors to Readers: Who are we serving? How? And How Well?* The three panels were on Friday morning *What are Users Using and Why?* **Liz Chapman** convened that one. **Chris Beckett** got together Panel two under the title — *Branding — How Important is it?* Finally **Dan Halloran** brought in the experts to explain — *Growth or Marketshare — What Drives Mergers and Acquisitions in the Publishing Industry?*

My immediate impression following the Retreat was that there were fewer big ideas than quite a lot of telling detail. In my experience the big ideas are usually wrong (and remarkably soon forgotten) and that what we have to get right in the digital environment is the detail — so this is not a criticism. Other records of the experience that have appeared between then and now seem to confirm this impression. The excellent summing up by **Ward Shaw** is available in *The Charleston Report* (v.8#1, pp.3). His main conclusion was that “we are all doing a pretty good job.” I shall return to that insight below. There is also a detailed summary of individual papers in three pages of *Scholarly Communications Report*, the journal edited by the ubiquitous **David Brown** and **Albert Prior** (www.scrpublishing.com).

In this retrospective record I shall concentrate on those aspects of what was presented that I found interesting and return to generalizations at the end.

David Seaman (Digital Library Federation) gave the first keynote. It was in part a distillation of the huge survey to be found at <http://www.diglib.org/pubs/scholinfol/>. A distillation of this distillation is as follows. Users currently have low expectations. As the new generation, which has always known the Internet comes through, they will demand more in many different ways. Malleability is the watchword. Publishers will have to provide “customer reshapable data” because they cannot provide for the multiplicity of needs. This is where libraries come in. There was a huge amount of material in the second keynote from **Colin Steele** of the **Australian National University**. **Colin** provided both digital dreams and digital nightmares for both publishers and librarians and there were a lot of them. In a dysfunctional environment does the dream of the librarian have to be a nightmare for the publisher? I do not think so, but his conclusion seemed to point in that direction. He plumped for new models of scholarly communication and the scenario postulated was that publication costs will be at the front end not the back end, that scholars retain distribution rights and rely on university infrastructural services, and that scholars need to own the process. To my mind, his use of the word “need” and the recognition that a “massive advocacy program (is) required” means that someone is trying to impose a solution.

Much of the first group of presentations was essentially descriptive but none the worse for it. **Derek Law (Strathclyde)** explained the social mission of his university library and **Clare Jenkins (Imperial College London)** talked about how to satisfy her academic users. There were some similarities. **Law**, in vigorous form, quoted: “libraries rule and they will kick the crap out of anyone who says otherwise” but admitted the “abject failure of university libraries to engage with collection building in the digital environment.” He was primarily concerned with the

role of libraries in their community — not a role much written about. For **Jenkins** as far as students are concerned librarians need to show that they have a role while making sure that they are supportive but not spoon feeding. The other two studies concentrated on usage, by researchers and (again) by students. I thought **Ward Shaw** was a little unfair when he suggested that what users of the system want is pretty well characterized and that user studies tend to confirm what we think we already know. There were some new insights, particularly in the presentation by **Phil Davis**. He analysed his survey of usage of **ACS** journals by a group of researchers (see <http://people.cornell.edu/pages/pmd8>). He looked at both actual usage and also referrals. He thinks he has found general rules about predicting use at least of the larger journals. Among the take-home messages was (for publishers) that they need to facilitate direct linking and (for librarians) that “redundant” purchasing is actually needed because users access content differently. **Carol Tenopir** is working with surveys and with students. Her two general questions related to concerns that come up more and more frequently. How can students be encouraged to use high quality sources rather than just googling? What features in a journal literature digital collection are most useful and encourage use? One answer may be to adopt a google-like interface. The study is ongoing and is becoming available at <http://web.utk.edu/~tenopir/nsf/index.html>.

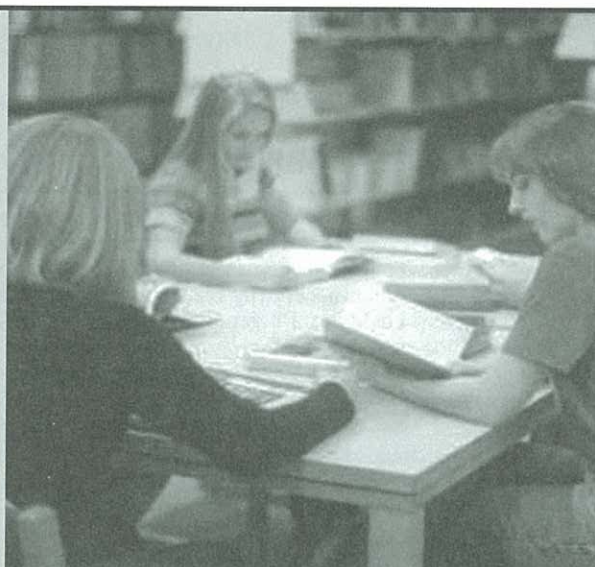
The second set of panelists interpreted branding in various ways. **Michael Mabe** set out what **Elsevier** authors want in a number of very well-digested ways. This is serious research based on questionnaires returned by a big sample of recent authors. The brand resides with the journal not the publisher. There is no doubt that speed of refereeing is important for the journal. **Elsevier** is sending a white paper out to editors to help them help their referees. There was a great deal of analysis in this presentation (which covered other issues also) and the slides repay detailed scrutiny. Among other conclusions picked out by **Mabe** were the facts that most authors are professional researchers in a university environment publishing about five papers a year, that they are very journal-focused and act as referees at least once a year, that they choose to publish from a set of journals selected first on specialization and coverage and then subdivided by quality and utility, and (finally) that they care passionately about the quality and speed of the journals they use but not to the exclusion of all other factors. **Chris Beckett** had managed to find a fluent and aware local academic. **Dr. Malcolm Campbell** found himself to be the anthropological specimen just dissected by **Professor Mabe**. He was not abashed. His question was — *Impact Factor: is it all academics care about?* His answer was positive. It was interesting to talk to **Dr. Campbell** after his presentation. He has become interested in the scholarly communication process and I suspect we will hear more from him in forums like this one — if he has time. The next two presentations were by publishers talking about what branding meant for them in their publishing strategies. **Jerry Cowhig** spoke up for branding by the publisher and described the way that the **Institute of Physics** has sought to increase its profile. For **Cowhig** trust in the brand is crucial. The brand of the journal carries much more prestige than e-prints or presumably by implication repositories of all sorts. That is the picture as it is now and it is why the journal survives as a vehicle for scholarly communications in spite of all predictions over the last decade. **Pippa Scoones of Blackwell Publishing** described how a publisher brands or tries to brand a new journal. Publishers are often (rightly) accused of not explaining what they do and why. Her conclusions were that publishers want to support new research either by creating new brands or repurposing old brands, and that they want to experiment with new models but in reality, where author preferences are so powerful, it is hard to combine both. I am assured that **Campbell** (a contributor to **Blackwell** journals) did not get

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forcefully was very much in tune with what **Scoones** reported. Finally **Peter Boyce** reflected again about the ways of his own astrophysical community. His research essentially backed up other conclusions from this session and the previous one. His recent studies show that ease of access is critical and that working academics will preferentially use what is available yet at the same time users will go to great lengths to get what they want. Journals as a brand are the overwhelming choice for trusted knowledge and e-prints are used for current information. Our job as information providers is to make things simple. One is reminded of the famous remark about swans. They glide along the river (the Thames in this case) so gracefully but below the white body the strong grey legs are working away furiously — our lot as intermediaries?

The Saturday morning panel broke new ground. Four speakers spoke with a fair amount of frankness about how publishing houses are bought and sold and why. **Mark Rowse** of **Ingenta** instructed us, as a former investment banker, about how outsiders see our industry. It may be an unusual market but it has a good track record for profits and further consolidation is still possible. His fascinating conclusion demonstrated how a financial buyer (from the outside) could pay more than the trade buyer (an existing player). **Mark** thinks change will come slowly with old models co-existing alongside new models. For me, the high spot of the whole conference was not on the program. **Dan Halloran's** own panel morphed into a truly absorbing presentation by two senior executives from **Goldman Sachs** on *Consolidation Dynamics in the Professional Publishing Industry*. They certainly answered **Dan's** question of them — why are people buying into the scholarly publishing industry when, to many inside, it seems so unstable? From the viewpoint of the investment bank, our sector is in good shape, and has proved itself over some years. They also pointed out that private equity investors can bring a great deal (including funds) into the industry. They do not see compe-

tion as menaced by mergers, but they did agree that being large is not necessarily being better. There was nothing particularly different in what these men from finance said, but just to hear them saying it gave the ordinary mortal the same sort of frisson as hearing the spies recently made at least audible in the current Hutton enquiry in the U.K. **John Cox** (mysteriously badged as John Edward Cox) complemented the two previous presentations, agreed in the main and gave very frank examples from his own extensive experience. As usual, he broke away from Powerpoint and his Word file is great reading. Businesses change but what is unusual in publishing is that they remain publishing industries. For him, mergers and acquisitions improve efficiency. As human beings we all compete and so do companies. **Cox** was the only speaker to deal directly with the **McCabe** thesis (or law) that mergers automatically lead to price increases. He cannot see the causation. The general view from the experts was that big price hikes are unlikely in the current environment. Perhaps this was the bit a somewhat bemused audience took home with them most gratefully. His penultimate paragraph is worth recording in full:

“One thing I do know is that a number of major commercial publishers are involved in contingency planning if open access reaches the ‘tipping point’ at which the whole industry switches business models. Open access will not lead to the demise of the large commercial publisher. If anything, they might well pick up the idea and run with it while the rest of the community continues its debates. Let us wait and see if open access is a substantive development, or little more than another bout of rhetoric that enables us to ignore the very real stresses in scholarly publishing.”

We can contrast this reflection with **Ward Shaw's** central observation. Those of us in the intermediary business (which meant all attendees except **Dr. Campbell**) “are all doing a pretty good job.” **Colin Steele** excepted (and much of his evidence seemed to me to be at variance with his final conclusion), there was an underlying assumption that it is our job to make the present system work for the benefit of author and reader. This is how we serve them best. 🌱